

# **Montana Shared Catalog (MSC)** **Cataloging Guidelines**

Revised Sept 2007  
MSC Cataloging Committee

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(Screen shots from GL3.1.360.3)

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## **INTRODUCTION**

The Montana Shared Catalog (MSC) serves a diverse group of libraries. The purpose of these guidelines is to create consistency within the bibliographic records in the catalog.

The main text portion of these guidelines will give an overview of topics that you should be aware of when cataloging in the MSC. The appendices that follow the main text have step-by-step instructions and may serve as “cheat sheets” for those doing the majority of the cataloging.

## **SELECTING BIB RECORDS**

It is recommended that when using the cataloging toolbar, the “Item Search and Display” be set to “All Libraries”. This allows the whole database to be searched. **It is the responsibility of each library to search the entire catalog before downloading any bib records into the MSC.** If a bib is downloaded that already exists within the catalog, the existing record is overlaid. This can remove valuable enhancements (series information, etc.) that have been made to the bib record.

When searching for a bibliographic record, try to find the title at least two different ways. For example, try an ISBN search and a title or an author search. It is also recommended that at least one of the searches is done in search instead of browse because not all items are indexed in the browse search. Keep the time between searching the MSC and downloading the bibs as short as possible to avoid duplicate bib records in the catalog. When choosing between two records for the same item, the preferred record is the Library of Congress record. This record can be identified by the DLC code in the 040 Cataloging Source tag.

## **WHEN TO DOWNLOAD NEW BIB RECORDS**

It is recommended that a bib record should exist for each format of an item. This means that if you have a DVD version of a movie, you should not add your holdings to the VHS version bib that is already in the system. The one exception to this is for paperback books. Paperback items may be added to hardcover format bib records. If the only record you find in MSC is a brief record, bring in a full bib record and transfer the items from the brief record to the full record.

Other guidelines include:

### **Fiction**

You do not need a separate bib for items that are different due to only:

- Publication date
- Publisher
- Page number
- Book Club editions (exact page numbers can be indicated at the item level)

- Trade paperback fiction can be merged with hardcover editions.
- Book club kits can be on one record regardless of the number of items in kit.

You do need a separate bib for items that are different due to:

- Format, i.e. large-type/audio/video/braille/kit
- Special edition or Abridged vs. Unabridged
- Illustrator
- New/different Introduction
- Translator

Holdings for paperback items may be attached to hardcover bibs as long as the above guidelines are followed

### **Nonfiction**

A separate bib may exist for items that are different due to:

- Publication date
- Publisher
- Page Number
- Edition
- Format
- Illustrator
- Introduction
- Translator

### **Audio or Visual formats**

You do need a separate bib for items that are different due to

- The number of items in the set, ie. 4 cassettes vs. 5 cassettes
- Different by format, ie. Cassette vs. CD, Beta video vs. VHS video vs. DVD
- Closed captioned for the hearing impaired
- "This film is described for people who are blind or have low vision"
- Letter box
- Wide Screen
- Full Screen
- Special/anniversary edition

### **Serial publications**

You do not need a separate bib for each volume of a serial set or journal

- The date of the individual item may not be indicated in the bib, instead the fact that the serial is currently being published will be indicated by an opened ended date, ie. 2000-
- The page number of an individual item will not be indicated; instead the fact that there is a more than one volume will be indicated in the 300 field as v.
- If a volume has a separate title this can be indicated in a 505 content note tag. Content notes are searchable.

You do need a new bib for a serial if the title of serial changes within the first five words.

- The date of the original record should be “closed” giving the year of the last date published under the old title, ie. 2000-2003
- If the number of volumes published under the old title is known it may be indicated in the 300 tag, ie. 10 v.
- A 785-succeeding note should be added giving the new title.

This applies to “books” published annually or on some other periodic basis, as well as periodicals or magazines. For example the World Almanac and Book of Facts should have one serial bib and all years should be attached to it instead of a different bib for every year.

## **SELECTING RECORDS FOR DOWNLOADING**

Library of Congress records (identified by a DLC in the 040 tag) are the preferred records for the MSC. If there are no bib records available with DLC in the 040, the next best records would be those with an Enc Lvl of 1. CIP (brief records from DLC based on publisher galleys) may be brought into the catalog, but will need to be updated. These records are identified by an Enc Lvl of 8. Please see **Appendix A** for instructions on updating CIP records.

## **IMPORTING RECORDS**

Records can be imported into the catalog in two ways; batch bib load or SmartPort. The System Administrators will create a template that can be used for doing a batch bib load. Please contact them if you need one created. See **Appendix B** for instructions on how to do a batch bib load.

Most libraries use SmartPort for importing records. Please see **Appendix C** for instructions on how to use SmartPort.

## **EDITING BIB RECORDS**

After importing the record, you may enhance the bib record. Remember however, that anything added to the bib record should reflect the whole title, and not just your specific library's copy. Anything that is specific to your copy can be added at the item level.

Suggested enhancements include: series information, additional subject headings, general material designation (GMD) in the subfield h of the 245, varying forms of the title, Abridged/Unabridged in the 250, content notes, and other notes.

### **Series**

If you want to add series information to a bib record, see **Appendix D** for detailed instructions.

## **Subject headings**

If additional subject headings are needed on the bib record, try to locate the subject heading in another record, then copy and paste it into the bib you want to enhance. If you can not find the exact heading you want to use, try to follow the example of an established heading from another bib record. Established headings are generally underlined when displaying a bib record. Headings that have yet to be established usually are followed by the word Unauthorized.

## **General Material Designator (GMD)**

GMDS are used to readily identify the item type in the Title field of a record. They are designated in the subfield h of the 245 tag. Some GMDs have been widely used by catalogers on a regular basis and more are being adopted as new formats emerge.

See **Appendix E** for all the GMDs used by the MSC and examples of each.

### **Large Print**

If you have large print items in your collection, follow the instructions in Appendix E for adding the GMD. You will also need to add a subject heading 650 tag of Large type books. (The first indicator is blank and the second is a zero.)

650 \_0 Large type books.

## **Varying forms of the title (246)**

1. If there is a "&" or other abbreviation in the first 5 words of the title make sure there is a 246 tracing with "and" or other abbreviation spelled out. If the 245 is "Beauty & the beast" there should be the following 246.  
246 3 Beauty and the beast
2. If the title is "Adventures of Dr. Brown" there should be the following 246.  
246 3 Adventures of Doctor Brown
3. If there is a number in numerals in the first 5 words then make sure there is a 246 tracing with the number spelled out. If the 245 is "40 days and nights" there should be the following 246.  
246 3 Forty days and nights

## **Abridged/Unabridged**

You may add a 250 tag that contains the word Abridged or Unabridged to allow this information to appear on the hit list within iBistro. This is to be used with sound recordings only.

## **Notes fields (5XX)**

Fields like the 505 (Contents note) and 520 (Summary) are encouraged. All local notes should go at the item level. See **Appendix F** for examples.

## **ISBN Numbers**

**Do not add additional ISBNs to an established bib.** This can create overlaying and merging problems when new libraries are added. If you feel you need the ISBN that exactly matches your particular copy then put it in the holdings information for your barcode.

For the same reason, if you bring in a record from OCLC that has additional ISBNs for Large Print (or regular print if on a Large Print record) or sound recordings, please remove these additional ISBNs before bringing the records into the catalog.

If you do not feel comfortable editing a bib record on your own, call your cataloging mentor (**Appendix G**) or someone from the Cataloging Committee (**Appendix H**) and they will help you walk through the process.

## **CREATING BIB RECORDS**

There may be some titles that you cannot find within the MSC or on OCLC. There are two different ways to deal with these titles. You can do original cataloging or you can add a Brief title. Please keep in mind, though, that the goal of the MSC to have OCLC level records for all permanent records in the Catalog.

Brief titles can be added in the circulation module to facilitate circulation. These titles have a unique format of BRIEF rather than MARC so they can be identified easily. When the Add Brief Title wizard is selected (listed under Circulation's Item Information & Maintenance) a template will appear which should be filled in as completely as possible, however the 245 title tag is the only required field.

These records are not considered permanent and these holdings are not added to OCLC during the OCLC upload. These titles have a home location of Cataloging so as materials are discharged they can be routed to the cataloging department for proper cataloging. Brief titles should be removed from the catalog as soon as possible. If you do add a brief title, remember to check for full bibs to replace them on a monthly basis.

If you are a full cataloging library with OCLC, you should create original records for new or unique material in OCLC using Connexion and then import the records into the MSC to comply with the goal of having OCLC level records in the catalog. Libraries that don't have full cataloging status, but are interested in creating original catalog records in OCLC for unique collection items can join the Montana Cataloging Agent/Client program. See **Appendix I** for a description of the program and a list of current Agent/Client partnerships. In instances where original cataloging through the Agent/Client program is not an option an original record can still be created in the Catalog Module using the Add Title Wizard. See **Appendix J**.

## **TRANSFERRING BIB RECORDS and HOLDINGS**

When multiple records exist in the catalog for the same item (or items that are deemed the same according to these guidelines) the better record should be selected (See Selecting Bib Records) and all holdings should be transferred from the duplicate record to the better record. See **Appendix K**.

## **OCLC UPLOAD**

The MSC automatically uploads item additions and discards to OCLC monthly. Extracting additions and discards takes place on the first business day of each month, through a report and extraction process done by system administrators. The process creates a file of all items with a Home Location of DISCARD and a file of all items newly created in the previous month. OCLC receives the files electronically. Based on the translation table established for the MSC, OCLC sets and deletes MSC library holdings on OCLC bibliographic records.

The OCLC upload process updates MSC library OCLC holdings. It does not include creating bibliographic (title) records in OCLC. In order to create unique title records in OCLC, the normal OCLC tools (Connexion) would be used, by full cataloging libraries. Copy cataloging libraries can be paired with an "MSC Cataloging Agent" if they have unique titles they feel should be included in WorldCat. Contact the MSC administrators about the Montana Cataloging Agent/Cataloging Client program.

See **Appendix L** for instructions on how to discard items.



## APPENDIX A

### Instructions for updating the CIP record:

CIP stands for Cataloging in Publication. CIP records are created by the Library of Congress before the book is actually printed and published. CIP records need to be updated to include missing information like number of pages and size. A publisher may also change the layout of the title page or a subtitle before the book is printed and the title information in the CIP may not match the final book.

Select **Modify Title** listed under the **Title Maintenance** tab and then search for title to be updated. Click **Modify**.

Unicorn Workflows

File Edit Wizards Helpers Modules Preference Tools Window Help

Acquisitions Cataloging Circulation Offline Reports Requests Reserves Serial Controls Utility

Common Tasks

Title Maintenance

- Add Title
- Modify Title
- Duplicate Title
- Delete Title, Call Numbers or It...

Item Maintenance

Authority Maintenance

Special Cataloging Functions

Modify Title

Silver and gold mining camps of the old West : a state by state American encyclopedia / Nestor, Sandy.

Control Bibliographic MARC Holdings Call Number/Item Bound-with

☐ Shadow title

| Rec_Type | a   | Bib_Lvl | m      | TypeCtrl |   | Enc_Lvl  | 8    |
|----------|-----|---------|--------|----------|---|----------|------|
| Desc     | a   | Entrd   | 061101 | Dat_Tp   | s | Date1    | 2007 |
| Date2    |     | Ctry    | ncu    | Illus    |   | Audience |      |
| Repr     |     | Cont    | be     | GovtPub  |   | ConfPub  | o    |
| Festschr | o   | Indx    | 1      | Fiction  | o | Biog     |      |
| Lang     | eng | Mod_Rec |        | Source   |   |          |      |

Tag Ind. Contents

| Tag | Ind. | Contents  |
|-----|------|---|
| 000 |      | 000007490121  |
| 043 |      | n-usp--   |
| 050 | 00   | TN413.A5 bN47 2007  |
| 082 | 00   | 622/.3420978 222  |
| 100 | 1    | Nestor, Sandy.  |
| 245 | 10   | Silver and gold mining camps of the old West : ba state by state American encyclopedia / cSandy Nestor. |
| 260 |      | McFarland & Co. : bJefferson, North Carolina, cc2007.   |
| 263 |      | 0701  |
| 300 |      | p. cm.  |
| 500 |      | "This work catalogs camps in Alaska, Arizona, California, Colorado, Idaho,                              |

Tag 100, Subfield a - Personal name

Search Save Add Holdings Modify Holdings Delete Close

Check the following fields and edit if necessary:

**Fixed Fields (008)** table at the top of the record:

- Change the **Enc\_Lvl** from 8 to **k**
- If the book is illustrated, change **Illus:** from blank to **a** for illustrations. Add **b** if there are maps. [These are the two most common.]
- Check the date in **Date 1**, change if necessary
- Check **Indx:**, if there is an index, supply **1**
- Check **Biog:** a= Autobiography, b=Biography, c=Collected Biography, d=Some biographical material is included

**Title (245 tag)**

- Check subfields a and b (title and subtitle). They should match the title page in book exactly except for capitalization. In the bib record, only the first letter of the title and proper nouns are capitalized.
- Check statement of responsibility (subfield c)- it should match the title page.

**Publishing information (260 tag)**

- If you changed the Date 1 field in the 008, the date must also be changed in the 260 tag

**Projected Date of Publication (263 tag)**

- Delete the 263 tag.

**Physical description (300 tag)**

- Edit subfield a (extent)  
Enter the number of pages, based on the item in hand.
- Edit subfield b (ill. &/or maps)  
When the item has illustrations, maps, etc., fill in the information according to AACR2 standards.
- Subfield c (size in cm.)  
Height is measured in centimeters (always round up). If the book is shorter than it is wide, measure both height and width (21 x 26 cm.)
- A few examples:
  - 300 xi, 345 p. :|bill. ;|c18 cm.
  - 300 1 v. (unpaged) :|bcol. ill. ;|c25 cm.
  - 300 425 p. (large print) ;|c24 cm.
  - 300 324 p. :|bill., maps ;|c21 x 26 cm.
  - 300 1025 p. ;|c22 cm.

**Bibliographical notes (504 tag)**


- Sometimes the page numbers are left out in the CIP record; complete the information.  
Examples:
  - 504 Includes bibliographical references (p. 389-412) and index.
  - 504 Filmography: p. 97-98.

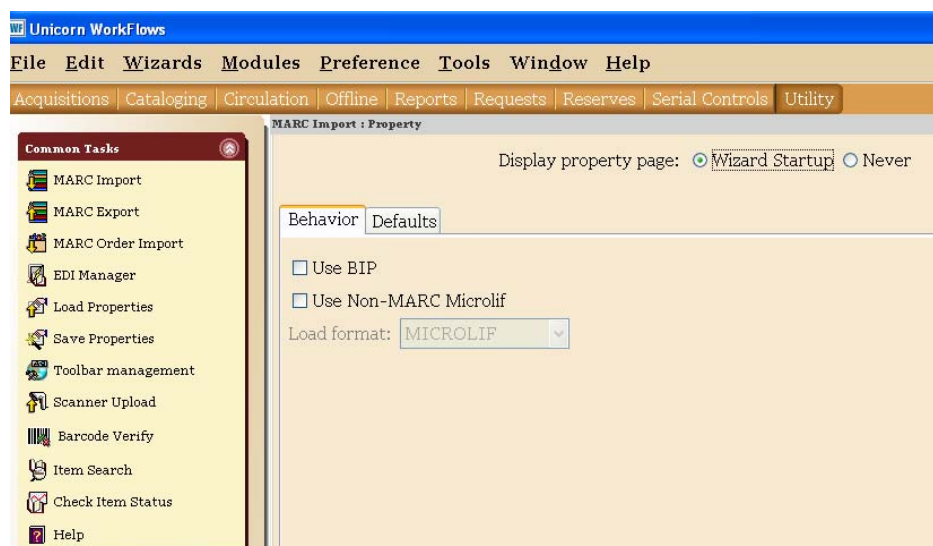
Click **Save** when finished updating record.

## APPENDIX B

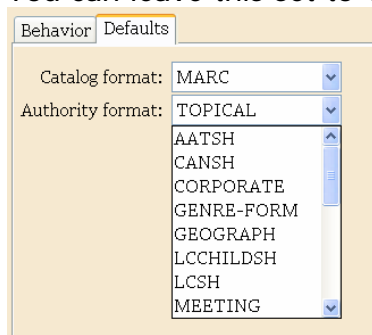
### Batch Bib load instructions

Records from OCLC and other vendors can be imported into the MSC in batch via the batch load process. Follow these instructions to bring in records that do not already exist in the MSC.

1. As always, search the MSC just before importing records to confirm that the title hasn't already been brought into catalog.
2. Save (export) records via normal practice, ie. to hard drive, shared drive, floppy (or use disk or FTP from vendor).
3. Select **MARC Import**  wizard listed under the **Utility** toolbar.
4. When you see the Behavior tab, leave both BIP (Books in Print) and Non-Marc Microlif unchecked.

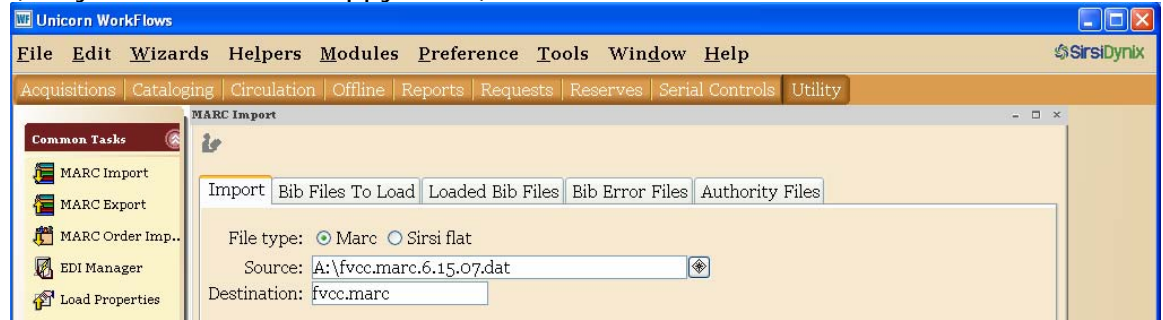


5. From the Defaults tab, the Authority format is set to Topical by default. You can leave this set to Topical.



6. Click **OK**, when Behavior and Defaults are set.

7. At the **Import** tab, use the gadget to find the Source of the exported file (i.e. your local drive, floppy, FTP.) Give a name to the Destination.



8. Select **Import**.
9. *Is diskette ready?* – **Yes**
10. *Are there more files to upload?* – Depends.
- Generally this will be no, but if you have more than one file to upload you *can repeat these steps and append the exported files to your destination*. Close window that pops up and click cancel to exit the wizard.
11. Switch from the **Utility** to the **Reports** Toolbar.
12. Select **Schedule Reports** wizard
13. Select **Load Bibliographic Records** from the Marc Import tab *or* **[Your Library] Bib Load** from your template folder if the System Administrator has created a report for you. (If you run this report from a template, most of the following steps will be automatically completed.)
14. Click on **Load** tab and enter selection criteria
- Under Input file information:
    - “File to load” – Enter your destination name. fvcc.marc for example.
    - “File format” – select MARC
  - Title Control Processing
    - “Title control number source for incoming items” – Use the gadget to select entries (ex. OCLC numbers, ISBN, LCCN, etc.) The first items selected MUST be OCLC 001 (o) followed by OCLC 035 (p). This order is important to maintain consistency among MSC libraries and prevent duplicate records.
    - “Title control number matching rule” – b
    - “Update date cataloged” – select Today
    - “Default record format” – usually MARC
    - “Update title control information....” – leave blank.

- c. Call number and copy processing
    - "holding entry preprocessing" – None
    - "copy processing" – o
    - "Call number load rules" – use gadget to select the classification system and MARC tags you would like automatically loaded call numbers to be based on.  
Ex. DEWEY,082,,N
    - "Default holding code" – select [your library]-BK, VID, etc.
    - "Update AUTO- assigned call numbers" – check
    - "Create/update price from holdings statement, 020 |c" - check
  - d. Bibliographic Record Processing
    - Check only "update bibliographic record when updating records"
  - e. Error Records
    - Select "write to error file"
15. Click **Run Now**
  16. Select **Finished Reports List** (still in Reports toolbar)
  17. Select your finished Bib Load report from list
  18. Confirm that all records have loaded properly without errors.
  19. Now you can go back to the **Cataloging** toolbar and work with the call number, item id, etc.
    - a. Using the **Call Number/Item Maintenance** wizard, search for each title that you just brought into the catalog.
      - Records that are given auto-generated call numbers must be edited.
      - Additional copies may be added at this time.
      - Note: some default information will added based on the holding code you selected in the load report. BK vs. VID for example.

## APPENDIX C

### SmartPort instructions

Individual records can be imported directly into the MSC from OCLC, the Library of Congress or other select libraries through the Z39.50 portal SmartPort. Follow these instructions to bring in new records to in the MSC.

1. Search entire MSC collection to find if item already exists is in the catalog.
2. Go to the **SmartPort** ⚡ wizard listed under the **Common Tasks** tab.
3. Confirm the default bib load settings before you import records. These settings determine match points (oclc#, isbn, etc.) from the bib record to ensure that records aren't duplicated and also which call number information will be selected from the bib for your local item. To confirm or change your default settings, right click on the **SmartPort** wizard and select **Properties**. Recommended settings are listed below:
  - Always select Match and Load
  - Title Control number source: Click gadget to see selection list. **Always select OCLC number (001) first, followed by OCLC number (035)**. This order is necessary to prevent duplicate records. After OCLC numbers 001 and 035, you can select ISBN, LCCN, ISSN numbers, etc. as you wish. The OCLC matchpoints display as "op" on the default screen. (pictured below)
  - Call sources: Preferences will vary library (example LC vs. Dewey). Once your preferences are established, click **Add**. You can establish more than one setting.
  - Library: Your library (of course!)
  - Format: Generally MARC, but you can select other options if needed.

The screenshot shows the 'SmartPort : Properties' dialog box with the 'Defaults' tab selected. At the top, there is a checkbox for 'Display property page:' with 'Wizard Startup' unselected and 'Never' selected. Below this, the 'MARC Import' section is expanded, showing 'Bibliographic Record Load Options'. In this section, 'Match and load' is selected with a radio button. The 'Title control number source' is set to 'opisl', 'Call sources' is 'DEWEY,082,,N', 'Library' is 'PARKHS', and 'Format' is 'MARC'. Below this, the 'Authority Record Load Options' section is also visible, with 'Match and load' selected. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

4. Select system(s) to search, typically OCLC
5. Select **Connect**.
6. Enter log on if necessary. For OCLC follow this format:  
OCLCAuthorization/OCLCPassword ie. 111111111/xxxxxxx1 (not case sensitive)
7. Search by author, title, ISBN, OCLC number or other search indexes.

**Search tips:**

- *Search or Browse by Author:* Search in Last name first name (no comma) format
  - *Search or Browse by Title:* Begin with first significant word; if search results in error "Invalid Search Expression Near-" put title in quotations marks
  - *Search or Browse by ISBN:* Omit hyphens.
  - *Search or Browse by ISSN:* Include hyphen
  - *Search or Browse by LCCN:* Omit hyphen
  - *Search or Browse by OCLC:* Digits only (omit "ocm")
  - *Change Search Pane View:* Combination search
8. Click **Display** to view full record and verify the bibliographic description. (Select most appropriate record. Records created by the Library of Congress are preferred. (hint: Look for DLC in the 040/Cataloging Source field.)
  9. Select **Capture** on desired record. You will see a screen displaying your load settings. Select **OK** if properties are correct.
    - Always select Match and Load (not replace current record)
    - Title Control Number Source should always begin with the letters "op"
  10. If you get message that the title was found in MSC based on a match point, confirm that existing bib record is a match. If it is do not bring in the duplicate record.
  11. After capturing record, you will see the full MARC record under the **Bibliographic** tab. You can update CIP records at this point if you choose.
  12. From the **Call Number/Item** tab, you can edit the item's call number. The call number must be unique. (If necessary give the item a bogus call number which can be changed later using the **Call Number and Item Maintenance** wizard.)
  13. Select current title from **Call Number and Item Maintenance** wizard and **Add Item**. Enter item information like barcode, etc.
  14. Select **Save**.
 

Note: When record is brought into MSC, only call number level information is available – you must add item info.

## APPENDIX D

### Series Statements

Series tags can be used to link monographic serials published under separate titles. There are different ways to do this including using a 440 tag, 490 tag, or a combination of 490 and 800/830 tags.

The MSC recommends:

1. Use the same tags consistently throughout the series.
  - All titles in a series should use the same tags. For example, if a series in the MSC catalog currently has 440 tags, then any new records from that series should also have the series information in a 440 tag.
  - If a series tag needs to be modified to match the rest of the series, copy and past the series statement from an existing record, editing the volume number if needed.
2. Series tags may be added to titles in a series if no 4xx tags exist. If this is the case, use 440 tags to add series.
  - Examples:  
440 \_0 Harry Potter |v4  
440 \_4 The geography tutor  
(1<sup>st</sup> indicator blank, 2<sup>nd</sup> indicator is number of non-filing characters.)  
(|v= volume number if series is sequential)

See examples of proper formatting for each of these tags see OCLC Bib Formats available online at: <http://www.oclc.org/bibformats/en/default.shtm>

Example records from within the MSC include:

440 tag - See title: **Teaching your baby to sign**  
**Oil and world power: background to the oil crisis**

490 tag - See title: **The Israel-Arab Reader: a documentary history of the Middle East conflict** (1984 ed.)

490/800 tag - See title: **The Pacific: California, Hawaii**

490/830 tag - See title: **Age-specific arrest rates and race-specific arrest rates for selected offenses, 1993-2001**



## APPENDIX E

### General Material Designation (GMD) (245 tag | h)

The GMD is used to show what type of material is being presented by the title. It helps to distinguish between the print and other versions of a title. For example:

Title|h[text (large print)]

Title|h[videorecording (DVD)]

Title|h[electronic resource]


GMD's should be added to the title for large print materials, DVD and VHS, Internet resources and CD-Roms, CD, Cassettes, and LPs and kits.

Approved MSC GMD's include:

- |h[text (large print)]
- |h[videorecording (DVD)]
- |h[videorecording (VHS)]
- |h[electronic resource]
- |h[electronic resource (CD-ROM)]
- |h[electronic resource (game)]
- |h[sound recording (cassette)]
- |h[sound recording (CD)]
- |h[sound recording (MP3)]
- |h[kit]

This list will be reviewed and revised annually to accommodate new format types.

Follow these steps to enter the GMD in Workflows:

1. From the cataloging toolbar, select the **Modify Title**  wizard which is listed under **Title Maintenance**.
2. Find the bibliographic record, and click **Modify**
3. Go to the 245 tag
  - a. Place the cursor after the end of the main title, but before any subfield punctuation
  - b. Type the delimiter (Shift and the backward slash \ key) This will create the pipe (|)
  - c. Type an h
  - d. Then type the GMD (See examples below) followed by a space, or if this is the last thing in the 245, end with a period.
  - e. When finished, click **Save**.

Examples:

Death of a bore|h[text (large print)] :|ba Hamish Macbeth mystery /|cby M.C. Beaton.

Sister Wendy|h[videorecording (DVD)] :|bthe complete collection /|ca BBC production.

Man in nature|h[videorecording (VHS)] :|bWork as play.

The complete idiot's guide to bringing up baby|h[electronic resource] /|cby Signe Larson and Kevin Osborn.

The coffee trader|h[sound recording (CD)] /|cDavid Liss.

Tombs of Atuan|h[sound recording (cassette)] /|cby Ursula K. Le Guin.

Natural ingredients|h[sound recording (LP)] /|cby Lucious Jackson.

(book club kit)

Three cups of tea|h[kit] |bone man's mission to fight terrorism and build nations—  
one school at a time /|cGreg Mortenson and David Oliver Relin.

## APPENDIX F

### Note Field Examples (5xx)

There are a variety of 5XX note fields that may be added as enhancements to title level records. These enhancements should only be made if they are applicable to all holdings in the Catalog.

Types of 5XX notes are too numerous to list here however the following are examples of titles within the Catalog that can be referred to for as guides for proper formatting:

500 General Note: See **Mountaineering : the freedom of the hills**  
**The emu farmer's handbook**

504 Bibliography Note: See **The Zimmermann telegram**

505 Contents Note: See **Montana's grandest : historic hotels and resorts of the Treasure State**  
**Backroads of Montana | h[videorecording (VHS)]**

520 Summary Note: See **Lewistown Qwest Dex white & yellow pages**

526 Accelerated Reader Note: See **Storm is Coming!**

586 Award note: See **Bridge to Terabithia**

### Study Program Information (526 tag) (Accelerated Reader)

For consistent records throughout the catalog, please enter Accelerated Reader or other reading program information as follows:

526 0\_ |aProgram Name |bInterest level |cReading level |dTtitle point level

Put |z (public note) information that may not apply to all libraries in an item level note field. A universal test number would be acceptable in the bib, but a "Test available" statement should be entered at the library's item level.

Examples:

526: 0 Accelerated Reader AR-ATOS|c4.4|d0.5|z32268

526: 0 Reading Counts RC|c5.2|d2.0|z21965

## APPENDIX G

### Cataloging Mentors

#### Introduction

Full cataloging status has been given to libraries that are approved to do original cataloging at the OCLC level or have staff regularly engaged in original cataloging. These members with full cataloging status will use Connexion, CatME, or Unicorn for original cataloging. Records will be contributed to the SIRSI shared database without review. These libraries include:

Bozeman Public Library  
Flathead County Library  
Lewistown Public Library  
Missoula Public Library  
Montana Department of Environmental Quality Planning Division Library  
Montana Historical Society Library  
Montana State Law Library  
Montana State Library

Member libraries that do not have full cataloging status are also able to do original cataloging in Unicorn. However, after cataloging a record they are encouraged to attach an item and call number to the original bib and place the holding in a location of "Review". The record will be reviewed by an MSC Cataloging "Mentor" assigned to their library (see table below) before displaying in OPAC. The review process will consist of checking for accurate tags, indicators, fixed fields, authorities, etc. Mentors must be notified when a new record needs review. The Cataloging Mentor will strive to review records in a timely fashion. If a library would like a Cataloging Mentor to do original cataloging for an item, they can fax or mail a copy of the necessary pages to the appropriate mentor.

| Mentor Name & Contact Information   | Libraries Served  |
|---|---|
| Paulette Parpart (MSLA-MAIN)<br>phone: (406) 721-2665<br>fax: (406) 728-5900<br>email: <a href="mailto:parpart@missoula.lib.mt.us">parpart@missoula.lib.mt.us</a> | CLINTON<br>DRUMMOND<br>FRENCHHS<br>HGEL1, HGEL2, HGEL3<br>NVPL<br>RONANHS, RONANMS, RONANEL,<br>RONANPBL                |
| Janice Kalvig (FCL-MAIN)<br>phone: (406) 758-5825<br>fax: (406) 758-5868<br>email: <a href="mailto:jkalgiv@co.flathead.mt.us">jkalgiv@co.flathead.mt.us</a>       | BCML<br>KRMC<br>LAUREL<br>MISSION<br>PLAINS (also Agent)<br>PLAINSK-12<br>PLUK<br>TFHS, TFMS, TFEL<br>TFPL (also Agent) |

|   |   |
|---|---|
| Jennie Stapp (MSL)<br>phone: (406) 444-5393<br>fax: (406) 444-0266<br>email: <a href="mailto:jstapp2@mt.gov">jstapp2@mt.gov</a>   | ALBK12<br>BFEL<br>BFHS<br>MSLAINTL<br>RCL-MAIN and branches<br>SGHS, SGEL<br>CPL (also Agent)   |
| Lois Dissly (BOZEMAN)<br>phone: (406) 582-2403<br>fax: (406) 582-2424<br>email: <a href="mailto:ldissly@mbozeman.net">ldissly@mbozeman.net</a><br>AND<br>Beth Boyson (BOZEMAN)<br>phone: (406) 582-2413<br>fax: (406) 582-2424<br>email: <a href="mailto:bboyson@bozeman.net">bboyson@bozeman.net</a> | THREEFKS<br>BELGRADE<br>YELLOW<br>MT-BIBLE<br>LIMA  |
| Roberta Gebhardt (MT-HIST)<br>phone: (406) 444-4702<br>fax: (406) 444-5297<br>email: <a href="mailto:rgebhardt@mt.gov">rgebhardt@mt.gov</a>   | WHITEHALL<br>CLANCY<br>BOULDER (also Agent)<br>HFL (also Agent)<br>BITTERROOT (also Agent)<br>POLSON (also Agent)<br>MT-LEG<br>MT-DOT<br>ROSEBUD<br>CPL |
| Marilyn Trosper (POLSON)<br>phone: (406) 883-8226<br>fax: (406) 883-8239<br>email: <a href="mailto:mtrosper@polson.lib.mt.us">mtrosper@polson.lib.mt.us</a>   | DARBY<br>HIGHWOOD<br>MEAGHER<br>SHERIDAN<br>THOM-HICK<br>TWIN   |
| Carrie Nelson (FVCC)<br>phone: (406) 756-3855<br>fax: (406) 756-3854<br>email: <a href="mailto:cnelson@fvcc.edu">cnelson@fvcc.edu</a>   | PARKHS<br>DILLON<br>MT-ACAD<br>MCC<br>MCPL  |
| Pam Arroues (MT-DEQ)<br>phone: (406) 444-6763<br>fax: (406) 444-6836<br>email: <a href="mailto:parroues@mt.gov">parroues@mt.gov</a>   | MT-OPI<br>MADISON<br>GPL  |

## APPENDIX H

### Cataloging Committee

| Name             | Description             | Library   | Email Address  |
|------------------|-------------------------|-----------|--|
| Janice Kalvig    |                         | FCL-MAIN  | <a href="mailto:jkalgig@co.flathead.mt.us">jkalgig@co.flathead.mt.us</a>         |
| Paulette Parpart |                         | MSLA-MAIN | <a href="mailto:parpart@missoula.lib.mt.us">parpart@missoula.lib.mt.us</a>       |
| Jennie Stapp     |                         | MSC       | <a href="mailto:jstapp2@mt.gov">jstapp2@mt.gov</a>                               |
| Vickie Dubbs     |                         | LBL       | <a href="mailto:vlubbs@lewistownlibrary.org">vlubbs@lewistownlibrary.org</a>     |
| Marilyn Trosper  |                         | POLSON    | <a href="mailto:mtrosper@polson.lib.mt.us">mtrosper@polson.lib.mt.us</a>         |
| Roberta Gebhardt |                         | MT-HIST   | <a href="mailto:rgebhardt@mt.gov">rgebhardt@mt.gov</a>                           |
| Lois Dissly      | Chair<br>2007-2008      | BOZEMAN   | <a href="mailto:ldissly@bozeman.net">ldissly@bozeman.net</a>                     |
| Suzanne Goodman  |                         | PARKHS    | <a href="mailto:sgoodman@livingston.k12.mt.us">sgoodman@livingston.k12.mt.us</a> |
| Carrie Nelson    | Vice-Chair<br>2007-2008 | FVCC      | <a href="mailto:cnelson@fvcc.edu">cnelson@fvcc.edu</a>                           |
| Pamela Arroues   |                         | MT-DEQ    | <a href="mailto:parroues@mt.gov">parroues@mt.gov</a>                             |

The Cataloging committee is open to anyone who would like to participate. Contact the chairperson if you would like to join.

## APPENDIX I

### Cataloging Agents/Clients

The Montana Cataloging Agents program enables copy cataloging libraries to have original cataloging records representing their unique, mainly Montana material uploaded to OCLC's Worldcat database. Catalogers from full cataloging Montana libraries receive OCLC training, using the Connexion or CatME client, in batch import of new bibliographic records from the copy library, the creation of a special MARC tag containing the copy library's OCLC code and the upload to WorldCat of the new bibliographic records for the copy library. The copy cataloging library is the "Client". The full cataloging library is the "Agent".

The Client Library is responsible for the creation of basic, accurate MARC records representing unique material in their library for which there is no current record in WorldCat. Client libraries may have staff that can do this, with training, or may choose to hire a temporary cataloger. Clients then extract the records to a file, which is sent electronically to their agent to load into Connexion or CatME for processing and upload to WorldCat. (Montana Shared Catalog libraries are able to catalog using Sirsi's Unicorn system and extract the records to send in an electronic file to their assigned Agent. Montana libraries using other library systems will need to verify that they can extract files of MARC records from their system.)

The Agent Library is responsible for checking the MARC record, validation of fields and indicators, entering the Client Library's OCLC code correctly in the appropriate MARC field and uploading the record to WorldCat.

If you are interested in being paired with a current Cataloging Agent or in training to become a Cataloging Agent, contact Ken Adams at the Montana State Library: E-mail: [kadams@mt.gov](mailto:kadams@mt.gov) Phone: (406) 444-3004 or 1-800-338-5087 (toll free in MT).

| Agent Name & Contact Information  | Libraries Served                       |
|---|--|
| Vickie Dubbs (LEWISTOWN)<br>phone: (406) 538-5212<br>fax: (406) 538-8559<br>email: <a href="mailto:vlDubbs@lewistownlibrary.org">vlDubbs@lewistownlibrary.org</a> | LAUREL<br>MADISON<br>ROSEBUD           |
| Janice Kalvig (FCL-MAIN)<br>phone: (406) 758-5825<br>fax: (406) 758-5868<br>email: <a href="mailto:jkalgiv@co.flathead.mt.us">jkalgiv@co.flathead.mt.us</a>       | TFPL<br>PLAINS                         |
| Jennie Stapp (MSL)<br>phone: (406)-444-5393<br>email: <a href="mailto:jstapp2@mt.gov">jstapp2@mt.gov</a>  | CPL                                    |
| Roberta Gebhardt (MT-HIST)<br>phone: (406) 444-4702<br>fax: (406) 444-5297<br>email: <a href="mailto:Rgebhardt@mt.gov">Rgebhardt@mt.gov</a>                       | BOULDER<br>HFL<br>BITTERROOT<br>POLSON |
| Carrie Nelson (FVCC)<br>Phone: (406) 756-3856<br>Fax: (406) 756-3854<br>Email: <a href="mailto:cnelson@fvcc.edu">cnelson@fvcc.edu</a>                             | MCPL<br>MCC<br>TRIC/PLUK<br>BCML       |

## APPENDIX J

### Adding Titles

To be used in cataloging items to be permanently cataloged in “brief form.” This record remains in the system after the item is checked in. Holdings for brief records are not added to OCLC.

When you pull up the Add Title wizard, you will get the Set Properties screen. Make the format MARC if you are doing a book. Uncheck the box in front of fixed fields. You do not need to include fixed fields in a brief record.

Libraries may enter as much information as they would like in this record. However, the **minimum tags and indicators required by the MSC are:**

- **(1XX) author when applicable**
- **(245) title and indicators**
- **(260) publication information**
- **(300) physical description**
- **(6XX) at least one subject heading**
- **(7XX) added author when applicable**

For examples of proper formatting for each of these tags see OCLC Bib Formats available online at: <http://www.oclc.org/bibformats/en/default.shtm>

Example records from within the MSC include:

**Book:** This house of sky: landscapes of a Western mind by Ivan Doig

**Video recording:** Backroads of Montana

**Sound recording:** Charlotte’s web [sound recording].



These are examples of complete records which can be used as guides. If you are not familiar with a particular tag you can look it up in OCLC. You do not need to include every tag you see in the examples, just those required above.

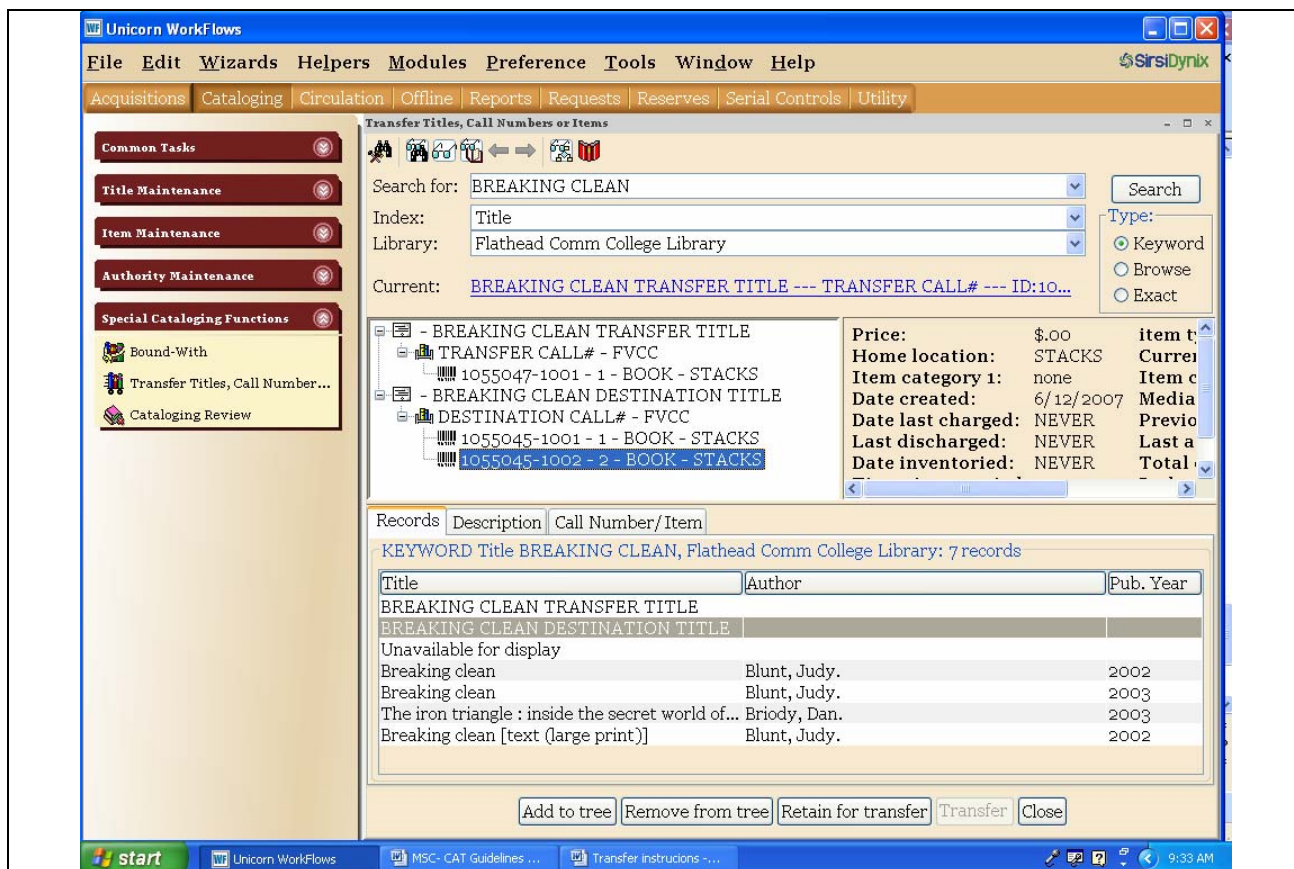


## APPENDIX K

### Transferring Bibliographic Records or Holdings

Used when multiple Bib records exist for the exact same title.

- From the Cataloging toolbar select **Transfer Titles, Call Numbers, or Item**  listed under **Special Cataloging Functions**.
- Search for the duplicate records you wish to work with.
- Review all appropriate records to determine which is the most complete and accurate.
  - If possible, retain the Library of Congress record (DLC in 040 tag)
  - You can use the **Display Bibliographic Description**  wizard to review the bib records.
- Note: Items transferred within the MSC in this manner are not uploaded to OCLC as deletions or additions. You'll need to do this work separately in Connexion or CatExpress after you complete the transfer in Workflows. (If you wish to retain any information like an ISBN number from the "old" record, it's helpful to write that down before you complete the transfer.)
- After reviewing, select the records that will be involved in the transfer and click **Add to Tree**. This includes both the record(s) to transfer and the destination record.



- Select the record you want to transfer and click **Retain for Transfer**. (The record will become bold and italicized once you've selected it for transfer).
- Then select the destination record and click **Transfer**.
- When you transfer the last item attached to a title, you will be prompted to approve the removal of that title.
- Note: The level at which you select items will affect the transfer. See chart below.



Item ID level



Call Number level



Title/Bib record level

| "To be Transferred"<br>Level | "Destination"<br>Level          | Results  |
|------------------------------|---------------------------------|--|
| Item ID                      | Title                           | Failed Transfer!<br>"Invalid Destination Element"<br>message   |
| Item ID                      | Call Number<br>Item ID          | Item ID transfers and becomes next<br>copy number (ex. copy 2) under the<br>Destination Call Number. The item<br>loses the call number it had before<br>the transfer.  |
| Call Number                  | Title<br>Call Number<br>Item ID | All of these transfers retain the<br>original Call number with the item<br>Id. If the transfer removes the last<br>item attached to a call number or<br>title you may get a message alerting<br>you about the removal the old<br>record. |
| Title                        | Title<br>Call Number<br>Item ID | All of these transfers retain the<br>original Call number with the item<br>Id. If the transfer removes the last<br>item attached to a call number or<br>title you may get a message alerting<br>you about the removal the old<br>record. |

- Log in to OCLC and update the holdings you have just added and deleted in the Shared Catalog.

## APPENDIX L

### Removing Records from MSC: DISCARD vs. DELETE

There are two ways to remove records from the MSC. One option is to DELETE the title, call number or item. DELETE removes the item (and record if your library has the last item attached to it) from the Montana Shared Catalog only. OCLC holdings are not affected by DELETED items. The other option is to DISCARD the holding. The DISCARD procedure removes the item and holdings from both OCLC and the MSC.

Use the DELETE option when you want to:


- Remove a second or third copy of an item from the same bib record. One copy will still remain in library's collection. This also applies to books on a serial bib record. Use DELETE if you want to remove an old edition but still have a newer edition on the same serial record.
- Remove brief records that were never submitted to OCLC.

Use the DISCARD option when

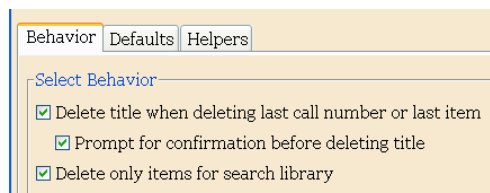
- Your library no longer has any copies and the holding also needs to be removed from OCLC.

All items with a home location of DISCARD will be removed from both the MSC and OCLC once a month. The monthly DISCARD reports are completed at MSC headquarters. When finished, they will email each library a report containing a Count of the number of items discarded. **Any item that is charged or has a hold, bill, or serial control record attached to it will NOT be removed.** A list of all items not successfully discarded will be emailed to the MSC Discussion list for investigation. After bills, holds, etc. have been addressed, the item can be left in DISCARD until the next month. DISCARD is a shadowed home location, so items will not appear to the public.

#### ***Sample DELETE Procedure #1 for Titles, Call numbers or Item ID.***

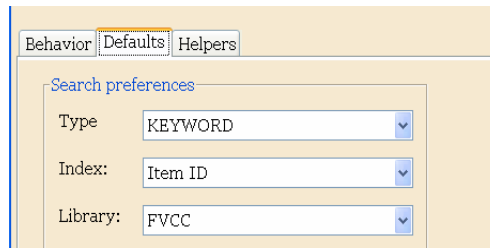
1. Make sure item is checked-in and there are no holds or bills attached to the item record. Also confirm that OCLC holdings do not need to be updated if using Delete.
2. Click on the **Delete Title, Call Numbers or Items**  wizard found in the Title Maintenance group of wizards.
3. Check your Property settings (right click on wizard and select Properties)

Check the "Delete only items for search library" box as a safety measure.



| Behavior                            | Defaults   | Helpers |
|-------------------------------------|--|---------|
| Select Behavior                     |  |         |
| <input checked="" type="checkbox"/> | Delete title when deleting last call number or last item |         |
| <input checked="" type="checkbox"/> | Prompt for confirmation before deleting title            |         |
| <input checked="" type="checkbox"/> | Delete only items for search library                     |         |

Make sure you are set to search by Item ID and your library only.



Behavior Defaults Helpers

Search preferences


Type: KEYWORD

Index: Item ID


Library: FVCC

4. Click **OK** when Properties are set.
5. Search for item by scanning barcode. You need to click the box before the title that you want to delete. The title will be bolded and in italics. Then click the **Delete** button.


### ***Sample DELETE Procedure #2 for Call Numbers and Item ID only***

1. Click on the **Call Number and Item Maintenance**  wizard. Search for the title that you want to work with. Highlight it.
2. Click on **Modify**. Make sure you are in the Call Number/Item tab.
3. Click on the item or call number you want to delete, and click on the **Delete** button.

### ***Sample DISCARD Procedure – Single items***

1. Make sure item is checked-in and there are no holds or bills attached to the item record.
2. Set the **Call Number and Item Maintenance**  wizard properties to search by **Item ID** (right-click Wizard, select Properties from menu, & select Item ID for "Preferred search index").
3. Search for item by scanning barcode. Change the "Home Location" to **Discard**.
4. This will not immediately remove the record. The record will remain in the system until the first of the month when the OCLC Upload and OCLC Discard reports are run. At that time the record will disappear. DISCARD is a shadowed location so the record will not appear to the public.

### ***Sample DISCARD Procedure –Single or Multiple items***

1. Make sure items are checked-in and there are no holds or bills attached to the item records.
2. When you have multiple items to discard, select **Global Item Modification**  listed under the Item Maintenance tab.
3. Select **Discard** menu for the **Home Location** value to modify. Scan barcodes of items to be discarded.

## Example Discard Scenarios

### Scenario #1

#### **If multiple copies are held by individual library:**

If you are certain there are multiple copies on the same record at your library go ahead and **DELETE** the item another copy remains.

### Scenario #2

#### **If item is the LAST copy held by individual library:**

DO NOT DELETE! The last copy needs to be included in the monthly discard report in order for holding to be removed from OCLC. Use a **DISCARD** procedure.

### Scenario #3

#### **If item is the LAST copy held by individual library and librarian has requested that a new copy is ordered:**

1. Have acquisitions staff order a new copy that matches the bib record before removing. Bibs need to match! After a new 'on-order' copy exists, you may remove the old copy using a **Delete** procedure.
2. If the new 'on-order' copy does not match existing bib, i.e., a paperback or new edition is being ordered instead, use **Discard** to remove OCLC holdings.

## **APPENDIX M**

### **Subject Headings (6xx tags) Montana Authors**

The following subject headings can be added to bib records for works created or performed by Montana residents.

650 \_0 Authors, American|zMontana.  
650 \_0 Poets, American|zMontana.  
650 \_0 Musicians|zMontana.  
650 \_0 Musical groups|zMontana.  
650 \_0 Actors and actresses|zMontana.

For stories that take place in Montana use:  
651 \_0 Montana|vFiction.

Please use the following guidelines to determine if the author or performer qualifies as a "Montana Author"

- Currently lives in Montana
- Born and raised in Montana
- Wrote the book while living in Montana
- Lived in Montana for a substantial length of time.


## APPENDIX N

### Book Club Kits

Kits assembled for book discussion groups can share the same bib record regardless of individual library kit contents. Local information about specific kit contents can be entered in note fields at the item level.

#### To create a new book club kit:

If a record for the title already exists in the Shared Catalog, you can create a new duplicate record and modify that.

1. Select **Duplicate Title**  wizard (listed under the Title Maintenance tab) and search for title you wish create a kit record for. Click **Duplicate**.
2. Now you will see the MARC record for the duplicated record. Make the following changes to this record:
  - a. Insert a GMD of [kit] in the title (245) tag. See example below:  
Three cups of tea|h[kit] :|bone man's mission to fight terrorism  
and build nations-- one school at a time /|cGreg Mortenson and  
David Oliver Relin.
  - b. Leave the physical description (300) tag as it is.
  - c. Add the following series tag:  
440 \_ 0 Book club kit
  - d. Add the following subject tag:  
653 \_ \_ Book group discussion kits.
  - e. Delete OCLC tag (001).
  - f. Delete OCLC tag (035).
3. Click **Save** when finished modifying record.

If the Shared Catalog does not have a bib record for your kit's title, import a record as you normally would and make the same changes listed above.